

Suggested List of Oral Interview Questions to Ask ESCOs

One size does not fit all. Pick and choose the questions that seem the most useful to your organization or project. The point is to create a list of questions that allow you to better discern the relative strengths of each proposal and proposing ESCO. These questions are just as important in assessing which ESCO your group finds best to work with over the long term.

Questions

1. **HISTORY:** How long has your organization been operating in the area?
2. **CORPORATE AFFILIATIONS:** Explain the affiliation of your company to a larger company, subsidiary, independent arm of utility company, etc.
3. **CHANGES IN OWNERSHIP AND BUSINESS STABILITY:** Has the company been bought/sold over that last year, five years, ten years, etc.?
4. **POST PROJECT SUPPORT:** What type of post project support does your company usually provide once a guarantee begins? Do you provide local or remote support? How are project support fees included into the overall project cost?
5. **LOCATION OF NEAREST OFFICE:** How close or far is the nearest support/service office for your firm?
6. **PROPOSED ENERGY SAVINGS:** What is the estimated range of energy and demand savings achievable for projects similar to ours and how are estimates derived? What is the estimated range of gross annual utility cost savings achievable for projects similar to ours, and the basis for those estimates?
7. **PRE AND POST DEREGULATION SERVICES:** What can your company do to assist us as utility deregulation arrives in the area? Do you offer independent consulting and negotiating services for acquiring electricity, natural gas and other energy requirements? What consulting and negotiating services do you offer for reducing utility service costs in a regulated utility environment? How can you help make our energy supplies more reliable?
8. **COMMUNICATION:** Describe the communication channels that will exist during the project. Is there a key point person involved throughout the process or are there different people who we will be contacting for each process (processes include audit, contract negotiations, installation, monitoring)?
9. **SCHEDULE:** Can you meet the proposed project deadlines? What is the current workload of those staff identified to work on this project? How well has the company done on completing past projects on schedule including both development and construction
10. **SUBCONTRACTORS:** How do you select subcontractors? How are you willing to work with us in selecting subcontractors?
11. **AUDIT:** Explain your process for conducting the energy audits? What is the process? Who is completing the audits? Explain your firm's creativity in developing a list of energy efficiency recommendations.
12. **GUARANTEE:** Describe your views on savings guarantees and the terms of your standard guarantee. Is it required? When do you recommend it? Is there a cost associated with it?
13. **MAINTENANCE AGREEMENT:** What is involved in a maintenance agreement? Is it required? How does it relate to the guarantee? What site specific operational and maintenance changes does your firm usually propose for similar projects?

14. MONITORING & VERIFICATION: What is involved in monitoring & verification? What methodology will be used? How does this account for changing variables such as utility rate increases, occupancy changes, climate changes, and additional energy using equipment such as computers? How are costs assigned to energy savings? How does it relate to the guarantee? How accurate have you predicted energy performance on past projects?
15. TRAINING: What training is provided for building operators? Who will conduct the training and how frequently? Is there an additional cost?
16. COST: What is the estimated cost-range for our project? Describe your approach to ensuring we get good value at a reasonable cost for this project? How will costs be reported for this project? Are you prepared to provide markup and overhead breakouts? Describe your process for project invoicing?
17. PROBLEMS/SOLUTIONS: What problems have you had in other performance contracting projects. What process do you propose for resolving issues and problems with us throughout this process? How will you accommodate site inspectors and their findings?
18. FINAL OPEN-ENDED QUESTION: Why should we select you?
19. FINANCING: Describe your firm's preferred approach to project financing. What financing rates are currently being accessed by your company? Who are your financial partners?
20. LEGAL AGREEMENT: What are key provisions and flexibility of your standard legal agreements/contracts.

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